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CROP OUTLOOK FOR EUROPE AND THE SOVIET UNION APRIL, 1949

Planted acreage and crop conditions in Europe as of mid-April point to some decline in crop production in 1949 compared with the unusually favorable harvest of 1948 according to reports received by the Office of Foreign Agricultural Relations.

Unless weather is unfavorable for crop growth during the remainder of the season, the combined production of all crops will be considerably above the unusually small output of 1947, but will be somewhat below the prewar average.

Reports indicate smaller seedings of winter grain than had been planned earlier and conditions in several important producing areas are somewhat below the almost uniformly favorable conditions of a year ago. The winter was mild and the abandonment of fall-sown crops was light. Winter rainfall was generally below normal and scattered spring rains have only partly relieved the shortage of subsoil moisture. Conditions for spring planting have been generally favorable but widespread rains are needed to prevent crop deterioration as the growing season progresses.

The acreage in winter grains is definitely below officially projected plans and in some countries where compulsory planting has been terminated or fall weather conditions were unfavorable, acreage is below a year ago. In several important producing countries little change in winter grains is reported but in the United Kingdom, Ireland, Sweden, Germany, and Greece, acreage is definitely below a year ago and weather conditions for fall plantings were unfavorable in some of the southern and eastern European countries. Weather has favored spring planting, however, so that total crop acreage is expected to be maintained with some shift to coarse grains and other spring crops.

Present condition of winter grains in the Low Countries, Sweden, Switzerland and Austria, is good to excellent, and favorable yields are indicated. Many of the major producing countries, however, report that winter rainfall was considerably below normal. Although scattered showers have produced temporary relief, widespread rains are generally needed.

While too early for an appraisal of prospects for such crops as potatoes and sugar beets there are some indications of an increase in the acreage of sugar beets compared with a year ago. On the other hand, there may be some decline in the potato area in northwest Europe where supplies were unusually plentiful last year.

In the Soviet Union the acreage seeded to winter grain is estimated 8 percent above 1948 and winter-kill was not excessive, despite shortage of winter snow cover. However, the light snowfall indicates some shortage of soil moisture. Although spring weather conditions were not fully satisfactory, the grain area seeded in early April exceeded by about 5 million acres that seeded at the same time last year.

The summary is based on reports received from U.S. Foreign Service Officers and information available from other sources.

Summary of European Crop Outlook by Countries

WESTERN EUROPE

United Kingdom: Due, reportedly, to the burden of harvesting a very large potato and sugar beet crop in the fall of 1948 and to intended increases in coarse grains, plantings of winter wheat are said to be considerably short of the official goal and also below a year ago. The winter has been mild and there has been practically no winter-kill. The outlook at present is for average yields, while last year's yields were above average. The acreage in coarse grains is expected to approach the goal of 6,200,000 acres, compared with an actual acreage of 6,000,000 last year. March rainfall was considerably below normal, but early April rains brought at least temporary relief.

Ireland: Weather conditions have been exceedingly favorable through the winter and spring months. Spring work is well advanced, and supplies of seed and fertilizers are ample. Nevertheless, there has been a decrease in winter wheat acreage, and sizeable reductions are also expected for spring wheat and oats, which would be only partially offset by an indicated 50 percent increase in the barley acreage. The resulting decline in the total area in grains is attributed to the termination of compulsory tillage. It is expected that the decline will be in areas less well adapted to grain production and more suitable for grass.

The Netherlands: Soil moisture conditions are favorable in The Netherlands and the condition of winter grains is satisfactory. Official grain acreage forecasts indicate an 11 percent rise in wheat acreage compared with 1948 and smaller increases in the areas of other grains. Good yields are anticipated, and a total grain crop some 3 percent above that of last year is officially forecast as of April 1. The estimated production is within 4 percent of the goal. The increased grain acreage is expected to be accompanied by a decrease in the potato acreage.

Belgium: There has been an expansion of the Belgian acreage in winter grains (wheat, rye, and barley) of from 12 to 16 percent, while spring grain plantings are expected to approximate those of 1948. The condition of winter crops is said to be much above average at this time. There is, however, insufficient subsoil moisture and rain is needed.

France: Whereas earlier reports had forecast some increase in grain acreage for 1949, the official April 1 crop report shows the total grain area, including wheat almost identical with that for the same date in 1948. Condition indices on April 1 were below a year ago, especially for wheat. The drought of the past winter continued through the early part of April. There was a small amount of rainfall during the second week of April, but this was least in the area of heavy grain production. However, even light rains and warmer weather have improved seeding and germination conditions somewhat, with April generally favorable for continued seedings.

The acreage of oilseed plantings was reported on March 1st to be over 10 percent greater than a year earlier, the increase being primarily in colza, while the area in potatoes this year is expected to be less than in 1948.

NORTHERN EUROPE

Denmark: As of April 1, pasture and fall-sown crops were in favorable condition. There were no losses from winter-kill. Precipitation since September had been only slightly below normal, but there is some deficit of subsoil moisture. Weather during March was favorable for spring field work.

The area in winter wheat though above 1948 is still below prewar. On the other hand, the area in winter rye is continuing above prewar and is also above 1948. The total area of both winter grain and coarse grain, however, is still less than prewar.

Sweden: As of April 1, fall-sown crops (wheat, rye, and rape) were in excellent condition. Damage from lack of snow cover in agricultural areas had been averted by a mild winter and ample surface moisture. However, October to March precipitation in agricultural areas was 86 percent of normal and had resulted in a shortage of subsoil moisture.

Winter wheat area is 14 percent less than in 1948, but abandonment is likely to be below the 8 percent average, whereas in 1948 abandonment was 14 percent. The winter rye area is about one-sixth less than in 1948. Part of the decline in area planted to winter grain is accounted for by the substantial expansion of the area in winter rape. Spring wheat area and the area in edible oilseed crops are expected to increase.

The farm labor situation is improved and mechanization is progressing. The fertilizer program is about the same as last year.

Finland: The total area planted to winter grain is reported to be slightly below last year. The northern part of the country had a normal winter but in the south there was little snow and it melted early. The winter, however, was unusually mild, and the condition of winter grain at the end of March was considered satisfactory.

CENTRAL EUROPE

Germany

Bizone: In the bizonal area a decrease compared with 1948 of approximately 4 percent in the acreage of breadgrains is expected to be only partially offset by an increase of 3.5 percent for coarse grains. The early forecast of yield per hectare of breadgrains is below the good 1948 yield. Total moisture from September through February was only 50 to 60 percent of normal, and in March was still inadequate. Partial rains and snow were reported during the early part of April, but moisture was still insufficient.

The anticipated decrease in breadgrain acreage is expected to be accompanied by increases for feed crops.

French Zone: The total grain acreage in the French zone is reported to be around 10 percent greater than last year. It is estimated that the 1949 grain crop will equal last year's.

Austria: The condition of winter wheat and rye is good. Winter-kill has been generally insignificant. There is some shortage of soil moisture due to a rather dry winter. March precipitation was also below average in most of the agricultural areas, retarding somewhat the growth of winter grain. If normal growing conditions materialize from now on, however, higher yields than last year are anticipated, largely due to greater fertilizer use. A 4 percent increase in breadgrain acreage and a 6 percent increase in coarse grain acreage is indicated. The weather has been favorable to an early start in spring planting. The condition of pastures is satisfactory.

Switzerland: Winter wheat is in good condition. The wheat acreage this year is expected to be about the same as last year. Potato acreage may be smaller.

Czechoslovakia: Snow storms and rain throughout most of the country during the first half of March alleviated the moisture deficit somewhat. However, by the end of the month, many areas were again suffering from dryness, the March precipitation having been inadequate. Wide variations in temperature during March are believed to have caused some damage to winter crops. Winter-kill in grains and oilseeds may exceed the normal losses of 3 to 5 percent. Weather during the last 2 weeks of March was favorable for spring work. The area seeded to winter breadgrains was approximately the same as that of last year. The acreage of spring-sown grains may be slightly higher in 1949 than 1948.

Poland: A dry fall retarded winter grains but winter weather has been more favorable, with mild temperatures and considerable precipitation. Heavy snowfall afforded protection during the relatively short period of cold. There are reports of further restoration of idle land, and spring plowing has been underway throughout Poland under ideal weather conditions. A shortage of horses is still reported, not fully made up by larger availability of tractors.

SOUTHERN EUROPE

Portugal: Rains beginning the second week of March finally relieved the drought condition which was beginning to have serious effects on all crops and gave rise to hopes for yields of wheat exceeding last year's poor results, and of perhaps harvesting an average crop. This is the third year in succession that Portugal has suffered from drought conditions.

Wheat plantings are estimated nearly equal to last year's. Delayed spring operations began to progress satisfactorily with the advent of rains.

Spain: Winter and spring drought conditions in Spain have dimmed hopes for a good crop this year. The present outlook is said to be for wheat and rye production no higher than 75 percent of last year's, with barley and oats down to 65 percent. Normal rains during April and May may lead to some improvement of these estimates.

Italy: Reports from Italy indicate about the same wheat acreage as in 1948. There is no indication of any sizeable change in the corn acreage, but the rice acreage is likely to decline. While there are reports anticipating slightly higher wheat yields than last year, the serious winter and spring drought prevailing in much of Italy up to early April, retarded progress of the crop. Unless there is early and adequate relief of the drought, some deterioration is to be expected in winter and spring grains and forage crops.

The importation of 2000 tons of hybrid seed this year may bring about an increase in corn yields.

Fruit and nut crops in Southern Italy and Sicily are reported to have suffered considerable damage from late frosts in March.

While fall applications of nitrogen are believed no higher than last year, sales for spring fertilization show appreciable improvement. Applications of phosphate are reported 30 percent above last year, though still below prewar. The current shortage of hydro-electric power is likely to curtail production of calcium cyanamide needed for the rice crop.

Greece: Unfavorable seeding weather, interference by guerilla activity, and low government collection prices are reported to have resulted in a 12 percent reduction of wheat and total grain acreage sown compared to the previous year. Production of wheat and total grains is expected to be down considerably compared to last year. A greater prospective decline in production than in acreage is attributed to the dry and cold winter and early spring, as well as to lower applications of fertilizer.

SOUTHEASTERN EUROPE

Hungary: A substantial increase is claimed in the area of winter grains seeded for harvest in 1949. Although there was some damage from frost and lack of snow in some districts, fall sowings for the most part have wintered well. Rains during March improved crops which, because of exceptionally dry weather during the previous months, had begun to suffer damage in some areas. Plans for the 1949 spring sowing program also call for an increase in sown acreage to a level above the 1933-37 average.

Yugoslavia: A reduction was reported in the winter grain acreage due to a dry fall, but heavy snowfalls in March provided abundant soil moisture for normal growth of winter grains and forage crops. Spring plowing and sowing is in full swing throughout the country.

Bulgaria: The winter grain acreage was probably below last year because of a dry fall, lack of treated seed, and other difficulties. Satisfactory condition of winter crops was reported in mid-March. The sowing of early spring crops was retarded.

Rumania: Acreage of winter wheat is reported to be slightly above 1948. The season has been unfavorably dry, however, and some winter loss is indicated. Part of the damaged area may be resown to spring wheat. The drought, which lasted for months, was broken in March. Prospects for the germination of spring sowings now under way throughout the country have improved, but much depends upon the rainfall during the next 2 months.

SOVIET UNION

The acreage seeded to winter rye and wheat is estimated to be 8 percent above 1948. There was little snow in a number of central and western regions last winter. Considerable snow cover, however, was reported in the eastern part of the country, including many of the regions which suffered from the drought last year. Except for short spells of severe weather in December and February, the winter was mild and winter-kill was probably not above average. The lack of snow, however, was having an adverse effect on the moisture supply in a number of regions. Although snowfalls in March improved the soil moisture supply in the central part of the country, thawing has been too rapid to obtain full benefit.

Although weather conditions during late March and early April were not fully satisfactory, the grain area seeded by collective farms by April 10 exceeded by about 5 million acres the area seeded during the same period last year. Seeding of spring small grains in many regions of southern Ukraine and in Crimea was completed earlier than last year. The planting of cotton in the principal growing districts is in full swing. Much attention is being given to the planting of trees for the tree shelter-belts in the steppe regions, in accordance with the Government Afforestation Plan promulgated in the fall of 1948.